



# Level UP Work Book

This workbook will be your notes, planner, and your roadmap to accelerating your financial growth.

# SESSION 1

## Affirmation Worksheet

*You cannot have a positive life and a negative mind.*

**Joyce Meyer**

*Seeing yourself as already having reached your goals is the key to shifting to a wealth mindset.*

**My Personal Affirmation**

*I have everything I need to be everything I need to be.*

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**Now it's time to create yours.**

**Start with I am or I have.....**

1.

2.

3.

# Wealthy Vision

## A WEALTHY WOMAN DOES

Adopting a Wealthy Vision means identifying your strengths. Your path to financial security will be paved by using your gifts and talents to serve others. It's important to analyze and uncover your dominant gift.

## A WEALTHY WOMAN IDENTIFIES HER STRENGTHS

She considers the following questions:

- What specific skills do people compliment you about?
- What are you doing when you lose a sense of time?
- What is your first memory of feeling a sense of purpose?

Please take this opportunity by asking yourself, which, among all your skills do you do better than most other people?

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This is not a time to be modest. If you don't know, ask the people around you

List those skills.

### My Comparative Advantages

1.
2.
3.

# Wealthy Vision

Now that we have identified your strengths it is time to isolate your dominant gift. The following exercise was excerpted from the book, *The Big Leap* by Gay Hendricks. He uses these questions to help people identify their “unique ability” or zone of genius.

## Complete the following sentences

1. I am at my best when I am doing...

2. When I am at my best I am doing.....

3. When I am doing\_\_\_\_\_ the thing that I love most about it is...

After completing this exercise you should feel a sense of excitement and joy if you have identified your unique strength. Now you have to determine how to use your talents to serve others, and the result should bring you closer to paving your pathway to financial success.

What is your takeaway from this exercise?

# SESSION 2

## Level Up To Lead Like Boss

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Sherry Sims  
Black Career Women's Network

1. Mindset

2. Positioning

3. Growth

# SESSION 3

## Leveling Up On The Links

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Jandie Turner  
Golf: The Sport of Business

1. Golf is the sport of business

2. What if I don't know how to play?

3. Make a business plan for golf?

# SESSION 4

## Level Up On LinkedIn

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Adrian Simpson  
Three Proven Strategies

1. Pursue Your Passion

2. Get More Visibility

3. Make More Money

Write your answers according to your career goals

# SESSION 5

## Level Up Your Profile

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Tamika Smith  
Let Your Light Shine

1. Be Clear-Stay consistent and on message

2. Be Bold-Bring the receipts

3. Be Precise-Check for typos

# SESSION 6

## Level Up Your Income

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Michelle Smith

1. Identify your unique strengths

2. Find opportunities to serve

3. Monetize your skillset

# About Your Instructor

## ABOUT DEBORAH OWENS

Deborah Owens is America's Wealth Coach™ and is on a mission to help women overcome their fear of investing through coaching, accountability, and support.

She is the founder of WealthyU: A Financial Wellness company that has a proven track record of helping thousands of women transform from cautious savers into confident investors.

After spending two decades in the investment industry Deborah has authored three critically acclaimed books: *A Purse of Your Own: An Easy Guide to Financial Security*, published by Simon and Schuster, *Nickel and Dime Your Way to Wealth*, and *Confident Investing*. Deborah created WealthyU to give women access to information that could only be obtained through private wealth managers. She is a 20-year financial services industry veteran and former vice president with Fidelity Investments.

Ms. Owens founded WealthyU to create customized training and coaching for companies and individuals. She holds a Masters of Business Administration from Loyola University of Maryland.



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